



Service **Autopilot**[™]

GLOSSARY

V3

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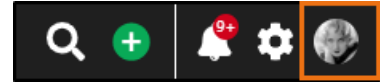
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A

Account Access Icon

The icon at the far top right of the SA Header, which shows either the avatar of a currently logged in user, or a generic profile image.

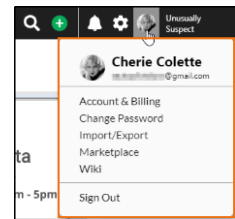


Accounts List

This screen displays a comprehensive list of Accounts (Clients and Leads) and Former Accounts. Use filters to see Accounts of different statuses, and to customize views. Go to **CRM > Accounts** or **CRM > Clients**.

Account Quicklinks

A popup that appears when you hover over your avatar in the Header. From here, you can access important account and company information, and sign out of SA.



Activity Stream

The history of all types of communication with an account including estimates won, leads converted to clients, emails in and out, estimates sent, and activity. You can filter by dates, or types of information shown, such as invoices only, or past and future visits.

“Add” (+)

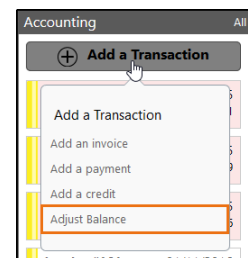
Located in the Header, in the shape of a plus sign. Hover over this to quickly add new items from the screen you’re on.



Adjust Balance

An accounting item that can be added to a client’s account to reconcile the client’s balance. This function cannot be applied to an Invoice and should be used only if necessary.

Adjustments are primarily used for transactions that do not sync from QuickBooks such as Journal Entries or Payment Discounts.



Alert

Alerts appear in the Quick Access icons at the top right of the Header. If there are any active, unread alerts, a circled red number appears.



Alerts can appear when Invoices are mailed, credit cards are charged, a new Lead is entered, a new Client is entered, a new Estimate is accepted, a new Contact Request is submitted (through the Client Portal), a new Estimate Request is submitted (through Websites), or a new Ticket is assigned.

Asset

Any non-human resource that a Member uses to do business, for example, vehicles or lawn equipment.

Asset Tracking

Found under “Team” in the Navigation Bar, this is where Assets such as machinery and equipment can be entered. Each item has a space to enter Purchase and Sales Information for future reference.

Asset Type

Found under **Settings > Asset Types**, these are the Assets that must be set up for use with the Snow System. Assets entered here will appear on Snow Jobs so they can be priced differently based on equipment used.

Automations

A Pro Plus feature that allows you to create a series of events or tasks that will automatically begin based on triggers and conditions. For example, if an Employee adds a tag to a client’s account then an email is automatically sent to the Client.

B**Banner**

A message that appears at the top of a Service Autopilot window, typically displaying important updates. The banner remains on the screen until you close it by clicking the **X**.


Biweekly

In Master Schedules, this term means every two weeks. The Odd/Even week designations that appear on Master Schedules refer to each week of the year if they were numbered from one to 52. The first week of January would be Odd, the second week of January would be Even. This pattern would continue regardless of the first date selected on the schedule.

Beta	New parts of SA that are subject to testing and improvements before being fully incorporated into SA.
Branch	In Automations, an IF event can be edited to have different outcomes based on different conditions, presented as ELSE conditions. This is called branching.
Branches	A feature that allows you to assign a primary work location to employees and Clients. For example, if a lawn care company had two separate offices that service two separate Client bases, Branches would be used so that Resources only have access to the Clients they service. Once a Branches are assigned, they cannot be removed, only changed. Branches are enabled under Settings > Company Information > Settings .
Budgeted Hours (B. Hrs)	This is the estimated length of time a service will take multiplied by the number of people doing it. Another way to calculate budgeted hours is to estimate how long it would take one person to do the work. B. Hrs is an important calculation in accurate Job Costing.
Budgeted Hours Override	<p>A tool available on jobs to help calculate the Budgeted Hours and the rate to charge based on a benchmark rate. This tool also gives you the ability to override B. Hrs for different times of the year.</p> <p>For example, you want to give a mow team more time during the rainy season, so from March 1 to May 31, on a particular visit, you may estimate .5 hours (30 minutes) to complete the work, but during the rest of the season it may take them only .33 hours (20 minutes) to complete it. This override will appear on the Legacy app and on printed Route Sheets. Each will divide the hours by the number of people on the team to estimate how much time it should take to complete the visit. This override also appears in Job Costing.</p>

C

Calendar	The Calendar is at Scheduling > Calendar . It lists scheduled visits as well as Tickets and Calendar Events.
Calendar Event	You can add an item to the Calendar for any event that does not directly involve Clients, as it will not appear on the Dispatch Board. You might use Calendar Events for personal appointments or office meetings.
Call	Employees can log inbound and outbound calls. For example, an employee might log that a Client has called the office, or that they called a Client. Calls can be assigned to other employees with a date or date range to appear on the calendar.
Cancel Account	This changes the account status to Inactive. You can cancel an Account from the Accounts list by selecting the client or lead, then clicking Actions > Cancel ; or select the individual Account to see the Review Account overlay, and click Actions > Cancel Account . Inactive Accounts can be reactivated at any time.
Certified Advisors	A group of select product and industry experts who have been tested on their expertise in using Service Autopilot. CAs can offer guidance and exclusive content to SA Members. They consult with you upon request to set up and use the system more efficiently, using the level of access that you agree to. For more information, click Certified Advisor Information under your avatar.
Chemical Tracking	A system in SA that tracks chemical products used on visits, and lets you inform clients about chemicals used. Tracking is usually required to comply with local and state laws.
Client	Customers of SA Members.
Client Portal	A website where Clients can log on to view invoices, make payments, update account information, and make requests. This is an add-on feature with an additional subscription.

Condition	In Automations, the specific set of actions or circumstances that cause another action to take place.
Contact	An additional person or entity who can be reached regarding an Account's property. A Contact might be a spouse or child of a property owner.
Contact Types	A category for a Contact that indicates the Contact's relationship to the property or property owner. You can customize Contact Types at Settings > CRM > Contact Types .
Credit	An accounting item that can be applied to an Invoice to reconcile the balance. Credits are similar to a Payment, except that typically, money was not received.
CRM	<i>Customer Relationship Management</i> is a strategy for managing your organization's relationships and interactions with Clients and Leads.
Custom Fields	Under Settings > CRM > Custom Fields , you can add fields that include specific information about Accounts, employees, or vendors. Examples include a gate code or property measurement for Clients, or t-shirt size for employees. <div data-bbox="548 1205 1263 1297" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Custom Fields Add new custom fields. Edit and deactivate custom field records.</div>
Custom Package	A Waiting List Job or collection of Waiting List Jobs that you can put together to renew on an individual Client basis, not based on the calendar year. Custom Packages are renewable monthly, seasonally, or according to your preference. You can customize this type of package to the client, so if you are doing renewals, then each client is renewed one at a time. Custom Packages are good for situations in which a Client will receive a set number of services regardless of what time of the year the work is started.
Custom Recurring Schedule	A schedule that is associated with a Client's recurring job that follows a set pattern, such as every week, two weeks, or the first of every month.

D

Dashboard	This multi-tab screen is a customizable collection of company data, including sales information, email delivery statistics, Key Performance Indicators, and other financial information. The Dashboard is accessed through Reports > Report Center . You can create multiple tabs and customize them by adding panels of data.
Dialog	Any popup with limited options for action, usually three or fewer. An <i>overlay</i> has a larger scope.
Discount	An item that can be added to an Estimate, Job, or Invoice to reduce the total price by either a percentage or a dollar amount. You can create and edit Discounts at Settings > Accounting > Discounts .
Dispatch Board	The center of scheduling-based activities in SA where you can view visits for a day or date range, manipulate or route the visits, and perform other actions related to the daily workflow.
Dispatch Calendar	The same data contained on the Dispatch Board but presented in a graphical calendar format. The Dispatch Calendar is like a hybrid between a calendar and the Dispatch Board. Go to Scheduling > Dispatch Calendar .
Document	Templates that can be used for creating emails, letters, text messages, and estimates. Go to Settings > CRM > Documents .

E

Email Activity	A list of all Emails sent through SA. This screen shows requests, delivery statistics, and how many emails were opened at a glance. Emails sent through Automations will display on this screen as well as within the Automation Builder. Go to Marketing > Email Activity .
Employee	A Member's W-2 employee, not a subcontractor.
Employee Time Off	Employee requests for time off work are at Settings > Scheduling > Time Off Request . Here, you can add or edit requests. You also can manage requests at Team > Employees > (Employee Name) on the "My Time Off Requests" tab.
Estimate	A document that you send to a Client or Lead containing a service description and pricing information for them to accept or reject. Go to Marketing > Estimates .
Estimate Grid	Part of an Estimate Document that shows the Services and Products that are being offered to a Client or Lead. You can add and edit Estimate Grids at Settings > CRM > Estimate Grids .
Estimate Reasons	Reasons why an Estimate would be won or lost. These can be set internally, or a Client/Lead can be required to select one when accepting an Estimate electronically. You can customize Estimate Reasons at Settings > CRM > Estimate Reasons .
Estimate Settings	You can customize many options that affect all your Estimates at Settings > CRM > Estimate Settings .
Estimate Stages	You can customize the different statuses for Estimates such as Draft, Won, or Lost at Settings > CRM > Estimate States .
Event	In Automations, an Event is an action that takes place only under certain conditions set up in the sequence rules. Rules trigger Events.

Expenses An accounting item that can be added to signify money paid by the company for something. An Expense can be added to Jobs and must be associated with a Vendor. You also can bill Expenses to a Client.

F

Field Any place in the system where a user can type input data.

Filters You can choose filters to specify what a screen displays. On the Dispatch Board, filters might include Resource, Service, or Tags.

Forms A tool to create online-only documents that gathers specific, customized information about clients, leads, jobs, assets, or employees. Forms is a versatile tool that can improve processes and services, create ratings for a company, and trigger Automations, among many other uses.

Full User A user who can log into both Service Autopilot and the Service Autopilot Team or Legacy apps. See also *Mobile Only User*.

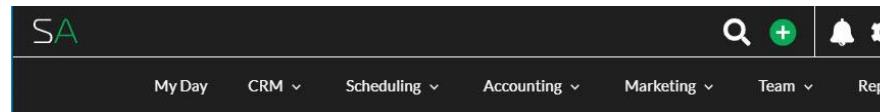
G

Grid The portion of any screen showing the results of a query. This is the “board” part of the Dispatch Board or the “list” part of the Account List. The grid layout is similar to a spreadsheet, with rows and columns.

H

Header

The top portion of all SA screens that includes your company display name, the Search Bar, and the Quick Access icons.

**Help Center**

Select **Help Center** from the dropdown list under your avatar to find all training and documentation from SA including videos, Knowledge Base articles, and user guides; along with links to contact SA and sign up for In-House Training.

I

Installed Product

A more costly or long-lasting item for which you need to keep warranty or purchase data or need to regularly maintenance for a Client. An example might be an irrigation system or a pool pump. The overlay for Installed Products contains fields for information like the date of installation, product description, serial number, and warranty information. This data can be kept for reference on the Account screen.

Installment Plan

Any collection of services billed to a Client at a predetermined, monthly amount. This was previously known as a “contract.”

Invoice

A record of Services and Products, usually to initiate payment from a Client. Contract Invoices are automatically created based on the parameters set in the Contract for a Client. Snow Invoices are manually created after Snow Jobs and the Snow Event are complete.

J

Job	A Service or Services with a Schedule attached. The three requirements to save a Job are that it must be assigned to a Client, a Schedule must be assigned to the Job, and a Service must be assigned to the Job.
Job Comments	A comment that can be added to a visit from the Legacy app or the Dispatch Board to help field and office employees communicate.
Job Editor	The overlay that contains information about a Job. It appears when you click on a Job from a Client Screen or Dispatch Board.
Job Notes	Information that you can add to either visits or Jobs that are visit-specific. Job Notes appear on Route Sheets and the Team and Legacy apps for the field resources to see, usually before the visit is started.
Job Overlay	This overlay contains information related to a Job including Accounting, Scheduling, Attachments, Notes, Details, Forms, and Products.

L

Lead	A potential Client. Leads have fewer options in SA because they have not yet agreed to work that will be performed. For instance, you cannot schedule jobs, create Invoices, or accept Payments for Leads.
Legacy App	Service Autopilot has two mobile applications. The Legacy app has many of the tools in SA, including Estimates and Invoices. The Team app is a streamlined version that gives field employees all the information they need for completing visits. The Legacy app was originally called the Mobile App,
Legacy Reports	Older versions of pre-built Reports that were available before the Report Center was released. All Reports listed on this page are still functional but are no longer maintained.

M

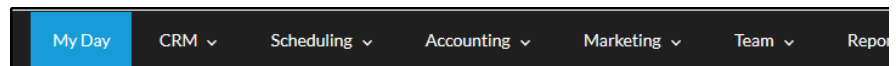
Map Code	An alphanumeric code to indicate an Account's property location on a map. Map Codes are not based on any map in SA and are completely customizable. An example would be for different Homeowners Associations or subdivisions.
Map Code Colors	Each Map Code can be assigned a color under Settings > Scheduling > Map Code Colors . These colors appear on the Calendar for Clients who both have Jobs and a Map Code assigned to them.
Marketplace	Service Autopilot's digital warehouse of helpful tools and templates. SA and Certified Advisors provide items like Document templates and Automations that you can download and customize. You can find Marketplace on the dropdown list under your avatar.
Master Custom Package	A template for a Custom Package that can be created and applied to clients. Custom package rounds are based on when a client signs up, not the calendar year. See also Custom Package .
Master Package	A job consisting of one or more waiting list jobs (also called rounds or applications), which are based on the calendar year. Master Packages are renewed on an annual basis.
Master Route	A type of Route that you can completely customize and save for future use, regardless of Schedule or Service. Master Routes are useful for any visits in which work needs to be done in a specific order regardless of proximity to the next visit.
Master Schedule	A set of manually selected calendar dates that can be selected on a Recurring Visit. When a Recurring Visit is created, each selected date on the calendar becomes a visit on the Dispatch Board.
Member	Any SA user.
Mobile Only User	An employee or vendor who has access to only the Team or Legacy app, not the SA desktop.

My Day Page The first screen you see when logging into Service Autopilot. It contains announcements from SA, Calendar events, Tickets, Notifications, and the Office Time Clock.

My Account Page A page under the Account Access Icon that you can visit to view current subscriptions, update your credit card, and add subscriptions.

N

Navigation Bar The header across the top of Service Autopilot gives access to the main areas of SA: My Day, CRM, Scheduling, Accounting, Marketing, Team, and Reports.



Non-Billable Items Different statuses that can be selected on the mobile apps that will appear on Timesheets and summarized under “Non-Billable Time.” An example might be “Fuel Stop” or “Coffee Break.” You can customize these at **Settings > Scheduling > Non-Billable Items**.

Notes to Client Notes that can be added to jobs from the Dispatch Board. These appear on the Team app, Legacy app, and Route Sheets.

O

On Demand Job A type of Job used with the Snow system for Jobs that occur during a given Event rather than on a specific calendar date. On Demand Jobs must be created at the Client level.

One Time Job A Job performed once on a specific date. An example would be a repair job or installation.

Overlay Overlays appear when you click on some aspect of a screen. They let you do a larger task related to an item, without going to a new page. Overlays generally contain complex information, such as setting up a job or making a payment. This is different than a dialog screen, which typically has a single function, such as the confirmation of an email.

P

Package	A series of Jobs, frequently Waiting List Jobs, performed for a Client over an extended period, scheduled as rounds. Packages are created on a company level and then assigned to Clients. There are two types of packages: Master and Custom.
Package Job	A series of Waiting List Jobs which are bundled together, can be assigned to multiple Clients, and are renewed annually. Examples would be fertilization or mosquito control services.
Payment	Funds received from a Client, usually associated with an Invoice. Payments affect a Client's account balance.
Payroll Report	Found under Accounting > Payroll Report , this page takes information from Timesheets and calculates hours that would be used for payroll purposes. This screen can be exported for use in other payroll software.
Pipeline	In Automations, this is the timeline or progression chart, showing which Clients are at which point in the various sequences of an Automation.
Product	Any item used on a Job, such as chemicals, mulch, or cleaning products that have no sale or warranty information that you need to keep for reference. For Products with sale or warranty information see Installed Product .
Projects	An interface through which you can build and work a large, complicated Job that may require multiple Services, down payments, phases of completion, and flexible dates. Projects are typically much more complicated than Multi-Day Jobs or Work Orders.
Property Data	Property Data includes property measurements and custom fields that belong to a property (versus client-specific custom fields). This is useful when a new owner takes over a property you've serviced.
Purchase Order	A document associated with and given to Vendors to purchase Products or Services.

Q

Quick Add

The button at the top right of the header where you can quickly add a Client, Lead, Estimate, Ticket, Job, or Package.

QuickBooks Online

A cloud-based version of QuickBooks accounting software that syncs with new Service Autopilot accounts.

QuickBooks Sync

A full two-way transfer of data between SA and QuickBooks Online or QuickBooks Desktop for Windows.

QuickBooks Sync Connector

The program through which the QuickBooks Sync is run for Members who sync with QuickBooks Desktop (for Windows). The QB Sync Connector can only be installed on one computer and a shortcut icon will be installed on the desktop of that computer.



R

Rate Matrix

An automatic pricing calculator tool that can be created and customized for each service.

ReCAPTCHA

A user authentication tool by Google available on Forms and Email throughout SA and the reCAPTCHA badge will appear on any page where a Form is embedded. The reCAPTCHA may ask users to verify that they are not bots, but it should validate users without interrupting their experience most of the time.

Recurring Job

A Job performed on a pattern of specific dates, such as every Tuesday or every other Friday. An example would be weekly lawn maintenance or biweekly cleaning.

Release Notes

We publish this list of changes to SA at each major update of Service Autopilot. After a system update, you can find the Release Notes by clicking the notification banner. You can always find the current and recent Release Notes in the Help Center under **What's New At SA**.

Report Center	Service Autopilot's Report Center is a one-stop center for reports and analytics about your company. Depending on your access level, you can create analyses, dashboards, and reports, as well as scheduling reports to email.
Resource	Anyone who can be assigned work—an employee, vendor (including contractors), or a team.
Resource Note Types	Specific types of Compliments or Complaints that can be entered into a Resource's Account. You can customize these at Settings > Scheduling > Resource Note Types .
Resource Timeslot	On the Dispatch Calendar, a period during which you can schedule work for a Resource.
Round	An instance of a Waiting List Job from a Package.
Route Sheets	Printable pages with details of a Resource's daily work as well as the order of their visits. Print Route Sheets from the Dispatch Board by clicking the Print button after the visits are dispatched.
Route Sheet & Work Order Formats	Different pre-built formats for Route Sheets and Work Orders. Any format selected under Settings > Scheduling > Route Sheet & Work Order Formats will apply to all Route Sheets that are printed from the Dispatch Board.
Rules	In Automations, Rules are a collection of Triggers and Conditions that begin and end a Sequence.

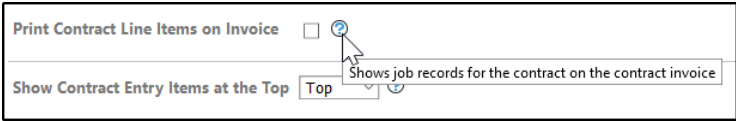
S

Sales Campaigns	A letter that can be used as marketing material to upsell to clients, recommend new services, or fill in the gaps on existing recurring services or packages. This is an advanced feature that requires successful completion of the webinar before functionality is enabled. Go to HELP > On Demand Classes > Pro Member Features .
Sales Rep	A designation that can be set to a resource to indicate that they are responsible for selling services or products. Once assigned to a resource, a Sales Rep can be assigned to an Account, Job, or Estimate for reporting purposes. A list of all Sales Reps can be found under Settings > Scheduling > Sales Rep .
Sequence	In Automations, a series of events that occur based on rules that you create.
Service	Billable work that a company performs. Once scheduled, a service becomes a visit.
Service Mode	There are three types of Service Modes: <i>Flat Rate</i> - a set fee regardless of time spent on the visit <i>Hourly</i> - the rate for a service is multiplied by the staff hours spent on a visit <i>Per Unit</i> - a fee that multiplies the quantity by the rate
Smart Maps	Basic map routing is available to all SA Members, but Smart Maps upgrades all your maps in Service Autopilot. Smart Maps lets you automatically optimize your routes, capture new clients in real time, and measure properties—even from your office. Smart Maps lets you measure a property using Google® satellite images. This feature is an add-on subscription. Go to “Account & Billing” from the dropdown menu under your avatar.
Snow Dispatch Board	A job board, similar to the Dispatch Board, used to manage On Demand (Snow) Jobs.

Source	How an Account found your company to contact you for service. You can specify the Source at CRM > Accounts > (Account Name) > Edit > Account Overview > Source . You can customize the options for the Source dropdown list at Settings > Client Source .
Snow Invoicing	Under Accounting > Snow Invoicing , this is where Snow Invoices are manually generated after a completed Snow Event.
Subscriptions	A set amount that is billed to a Client every month but is not associated with a Job. Also a selection on the Accounting Tab of the Navigation Bar which will display an overlay of all active Subscriptions.
Sub Status	An additional status designation that can be added to a Job. A Sub Status may be used on a Waiting List Job that is awaiting parts or a subcontractor's availability. A Job's Sub Status can be viewed on the Waiting List or Dispatch Board. Sub Statuses can be customized under Settings > Sub Status .

T

Tags	A customizable marker that can be added to a Client or Lead's account. Tags are a powerful tool that can be used in filtering for Clients, Leads, or Jobs. They can also be used as Triggers in Automations.
Team	Considered a Resource in SA, a Team is a container for any employee or vendor, for ease of scheduling. In most cases if multiple people are going out on a job, they will be assigned to a Team.
Team App	A streamlined version of the Mobile App designed to help field Employees view and complete work.
Team Directory	A list of all active Employees and Vendors that displays a thumbnail image, Resource type, SA User type, and contact information. The Team Directory is under the "Team" tab on the Navigation Bar.
Team Tracking	A selection under the "Team" tab on the Navigation Bar that displays GPS tracking information for mobile users.

Template	Saved versions of Jobs, Estimates, Emails, letters, or other Documents that can be saved for future and repeated use.
Timesheets	A record of time logs for all Resources. Time can be input on the mobile apps, Wall Clock, Dispatch Board, or on the Timesheet itself. Timesheets are under the “Accounting” tab on the Navigation bar.
Ticket	The Ticket replaced To Do’s, Calls, Notes, and Touchpoints to consolidate information about communications with a client.
Tool Tip	A “?” icon in SA which gives information about the part of the screen you’re using. Hover over a Tool Tip to view the associated text. 
Trigger	In Automations, an Event that has a specific Condition associated with it. Completing it causes another action to take place.


U

Unit	For the <i>Per Unit Service Mode</i> , the Unit refers to the “Qty” field on a Job or Invoice.
User	Any person with access to SA.
User Roles & Rights	Permissions for SA Users that allow access to various areas of the system. You can customize user rights at Settings > User Roles & Rights .

V

- Validation** Rules for what fields are required when creating a Client, Lead, or Job. Validation Rules can be set under **Settings > Company > Validation**.
- Vendor** A term for a Resource who is NOT a w2 employee such as a sub-contractor. Vendors can also be entities such as retail or wholesale suppliers, or Sales Tax agencies.
- Vendor Types** Categories for Vendors such as contractor or sales tax agency. You can customize these at **Settings > Scheduling > Vendor Types**.
- Visit** Similar to Jobs in V2, a Visit has line items, products, and discounts. You can make changes to individual visits without changing the Job.

W

- Waiting List** A different view of the Dispatch Board that contains Jobs that have a date range instead of a specific scheduled date. Once scheduled, a Waiting List Job will move to the Dispatch Board.
- Waiting List Job** A Job that is performed one time within a date range, rather than on a specific date. An example would be an installation or small project that needs to be done by a certain end date, but the date for the Job is flexible.
- Wall Clock** This feature lets you set up a spare laptop or tablet for clocking in at the office.
- When each Resource uses a PIN and clicks **Clock In**, **Start/End Break**, or **Clock Out** the Wall Clock creates a record for the day, as well as an audit record, which will appear on the Resource's Timesheet.
- 
- Work Order** A Job that contains two or more Services that are grouped together on the Dispatch Board. Work Orders are highlighted in blue on the Dispatch Board.